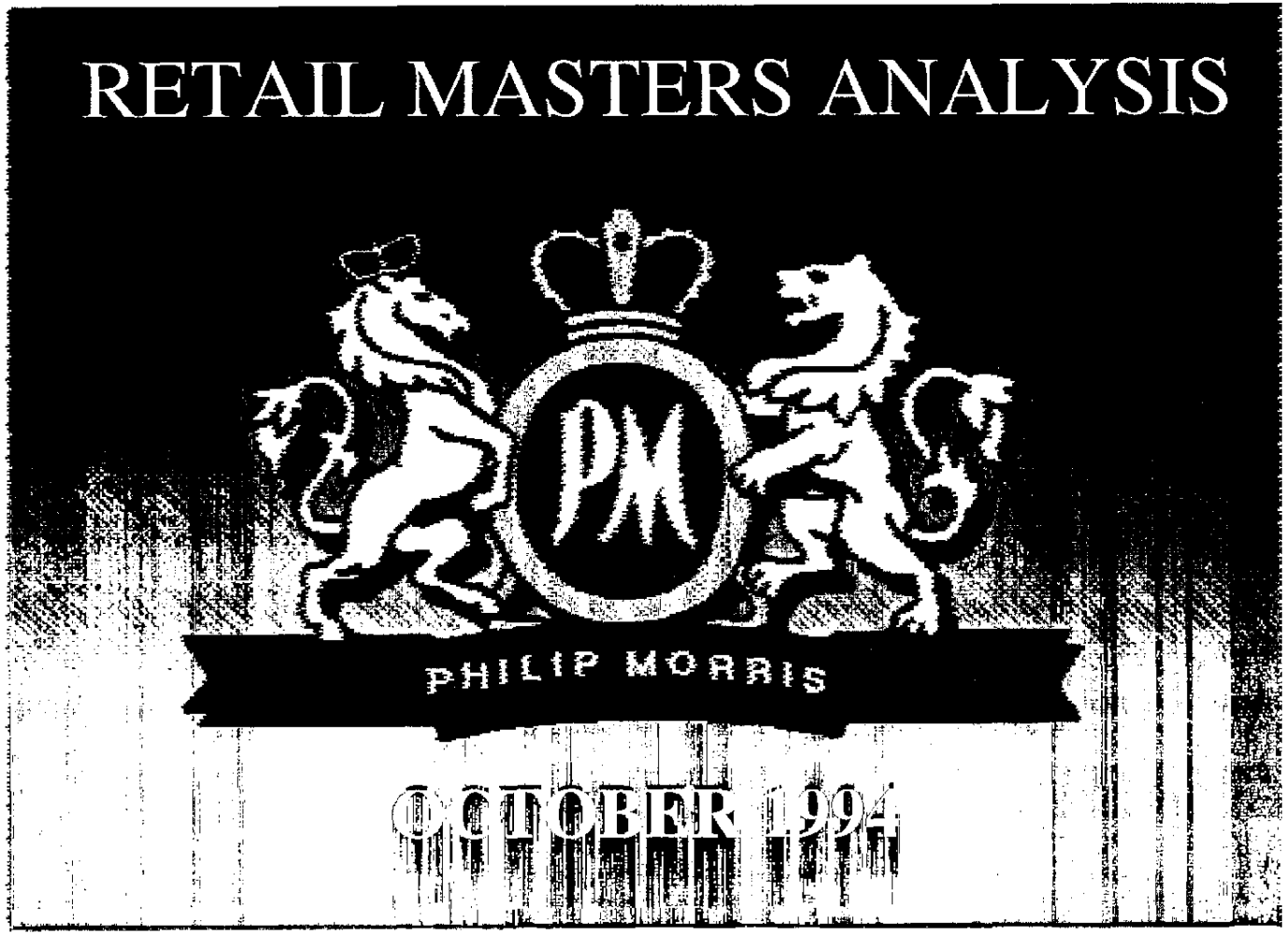

Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004

OBJECTIVE

- Evaluate retail takeaway performance for PM, competitive manufacturers & categories in Masters vs. Non Masters outlets

  - Industry Volume
  - Inventory
  - Share
  - Promotional activity
  - Price gap

- Provide insight for future enhancements/modifications to the Retail Masters program.

- Establish methodology for ongoing evaluation & tracking of the program.

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Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004

METHODOLOGY

- Source: Nielsen Integrated Panel
- Individual stores coded for Retail Masters status based on May '94 definition from SPACE.
- Disaggregated store level data
  - Unweighted vs. store weighted results

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Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004

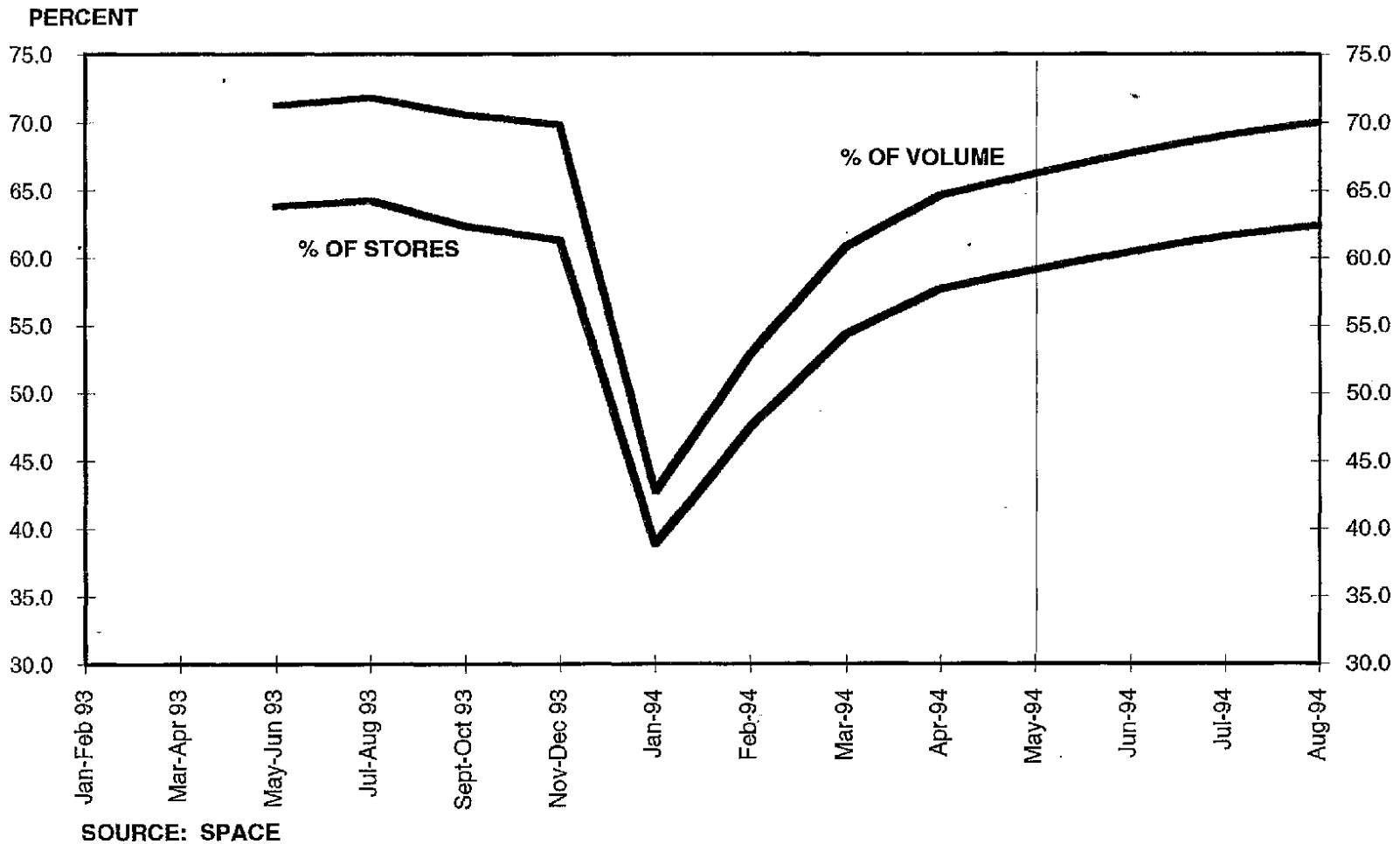
PM USA RETAIL MASTERS ANALYSIS

- Analysis based on 2,824 Nielsen sample stores

	CONVENIENCE	SUPERMARKETS
Retail Masters	508	742
Non Masters	290	1,284
	798	2,026

Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004

RETAIL MASTERS PENETRATION
C-STORES



SOURCE: SPACE

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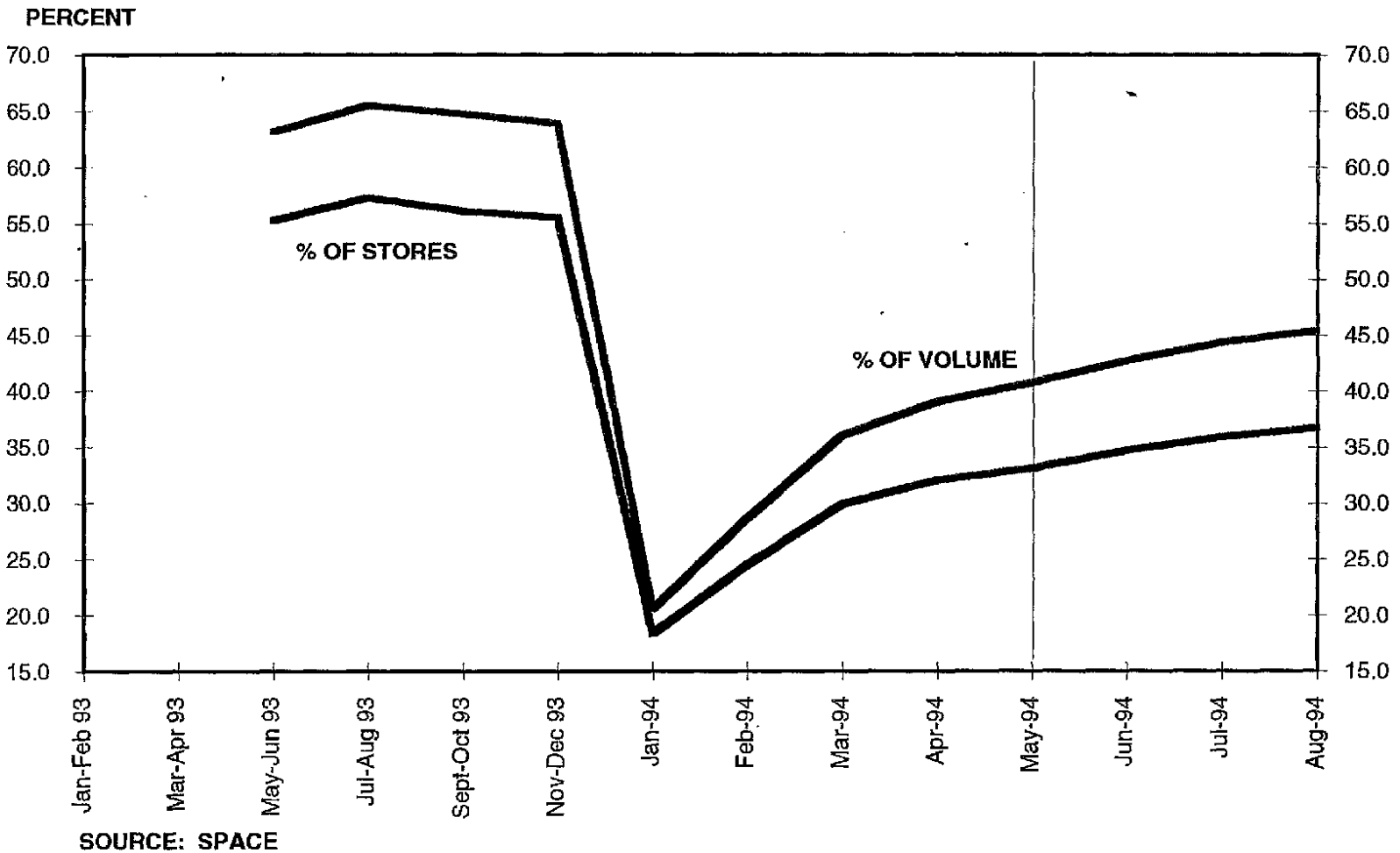
RM CSTORE CHT

Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004

RETAIL MASTERS PENETRATION
SUPERMARKETS



SOURCE: SPACE

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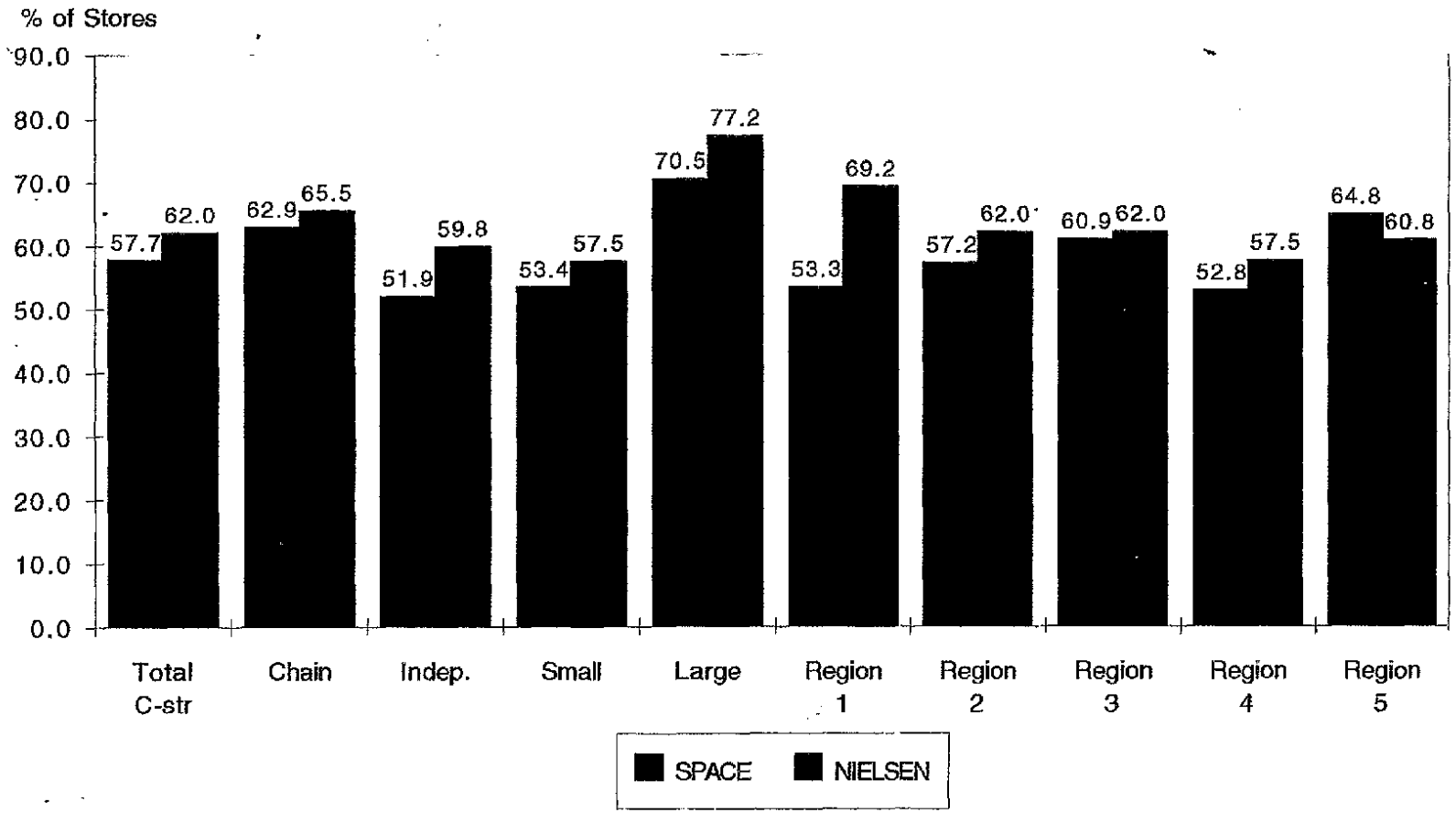
RM SMKTS CHT

Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004

The Nielsen panel is generally consistent with SPACE, with Retail Masters penetration at 62% and 58% respectively in convenience stores at a total US level during May 1994.



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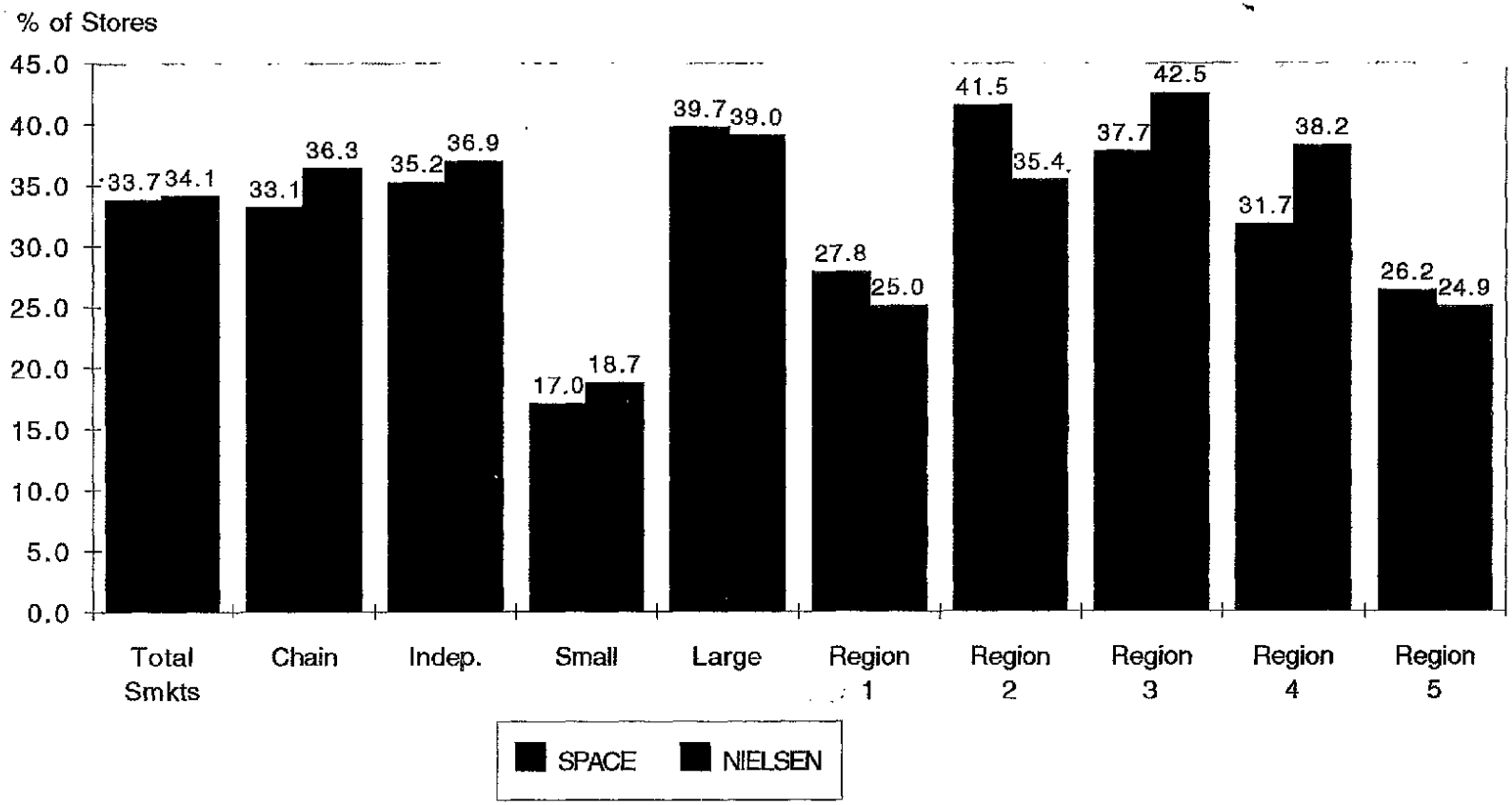
Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004

The Nielsen panel is generally consistent with the SPACE database, with both sources indicating Retail Masters penetration of 34% in supermarkets at a total US level during May 1994.



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Source: https://www.industrydocuments.ucsf.edu/docs/jlkn0004